

Workshop Bar Coder – Set Up and Use

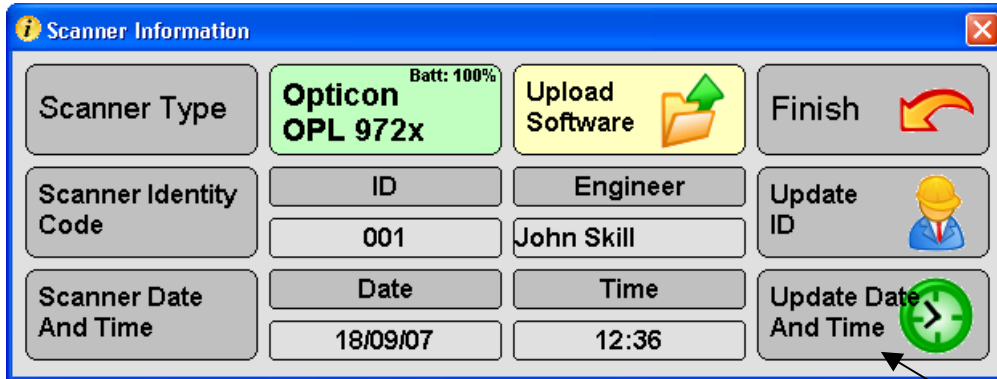
Software/Scanner Setup

Ensure that the scanner is attached to the cable and the cable to the computer.
Alternatively the scanner should be located in the cradle and the cradle attached to the computer.

An icon will have been placed on your desktop. Double click on this icon.




The “Check Scanner” button can be used to ensure the communication between the scanner and the PC is active.



If the device date or time is incorrect it may be altered here. Click on the “Update Date and Time” option to change the date and time on the scanner to the current date and time from your computer.

The “Update ID” option can be used to ensure the correct engineer id is assigned to the scanner.

 If the scanner is not detected use the “Settings” option to access the scanner set up. Please refer to Workshop Barcoder v4 Installation notes for more information.

Click on the “Finish” option to exit the scanner screen.

The software is now set up and ready to receive information.

Notes:

Gold Set up

The bar code scanner needs to be set up for use and coded to an individual engineer with the hourly rates to be used.

Log into the Ibcos Gold software in the usual way.

- **Company Control File**

(System Management, Company Control Files, Workshop, Key Fob)

The workshop job cards are printed with a Job Start and Job End bar code for scanning.

Two additional categories of bar code start and end times may be set up, for example, these could be used for travel time or idle time.

A labour rate, as described below, may be set for each of the two types of time. Alternatively, if the labour rate is set to zero the charge rate will be taken from the time clock control, skill level time.

- **Invoice Type File**

(System Management, Invoice Type File)

The Invoice Type file should be updated for each invoice type used. An array of up to 12 labour rates is available, on the “Labour” tab, to enter a charge out rate and prefix code to be used when charging labour to the workshop job.

The option for “Time Base” should also be set on this page.

Time of Day – hours charged to the job on a time basis. For example, charged at Rate 1 for time recorded between 9.00am and 1.00pm.

Hours per Day – time is charged on an hourly basis. For example, charged at Rate 1 for the first 4 hours of the day.

- **Labour Rates Descriptions**

(System Management, Wholegoods/Workshop sub-menu)

These may already be set up but should be reviewed. Up to 12 labour rate descriptions may be set up here, which are associated with the labour charge out rates set on the Invoice Type File.

Each labour rate may have a payroll pay code attached if the labour hours are to be transferred to payroll. This is the pay type used for the employee hours in the payroll module. The hourly rate for costing purposes is set up on the employee rate file as detailed below.

| Labour Rate | Description | Pay Code |
|-------------|---------------------|----------|
| 1 | NORMAL TIME | 1 |
| 2 | OVERTIME | 2 |
| 3 | APPRENTICE NORMAL | 3 |
| 4 | APPRENTICE OVERTIME | 4 |
| 5 | CONTRACTORS | |
| 6 | | |
| 7 | | |
| 8 | | |
| 9 | | |
| 10 | | |
| 11 | | |
| 12 | Adjustments | |

Note - Payroll Pay Codes 1 - 7 are used for standard pay types such as basic pay, overtime etc. Pay Code 8 is for holiday pay and Pay Code 9 is for sick pay.

- **Bank Holiday Diary**

The Bank Holiday Diary is used to specify any days in the year when employee labour is charged differently, for example Christmas Holidays.

If a labour period covers any days specified here then the customer is charged the Bank Holiday rate rather than the standard rate.

Up to thirty holiday periods can be defined in the diary.

One Bank Holiday Diary Code is used for all skill levels and determines when the system should charge the Bank Holiday Rates.

Refer to Time Clock Control below to set bank holiday rates if applicable. If left blank the system will not charge for bank holidays.

- **Time Clock Control**

Time Clock Control is used to setup up labour rates to be used for daily hours or daily time. The invoice type file specifies whether the time or hour basis is to be used for each type of job.

Time of Day

Diary Code Drives the Bank Holidays for All Skill Levels
Bank Holiday Code: **A All days chargeable**
Skill Level: **1** * Any Blank Weekdays will assume Monday Settings!

| Monday | Time From | Rate | Tuesday | Time From | Rate |
|--------|-----------|------|---------|-----------|------|
| 1: | 8:30 | 2 | 1: | 0:00 | 0 |
| 2: | 9:00 | 1 | 2: | 0:00 | 0 |
| 3: | 17:00 | 2 | 3: | 0:00 | 0 |
| 4: | 19:00 | 3 | 4: | 0:00 | 0 |
| 5: | 0:00 | 0 | 5: | 0:00 | 0 |

| Wednesday | Time From | Rate | Thursday | Time From | Rate |
|-----------|-----------|------|----------|-----------|------|
| 1: | 0:00 | 0 | 1: | 0:00 | 0 |
| 2: | 0:00 | 0 | 2: | 0:00 | 0 |
| 3: | 0:00 | 0 | 3: | 0:00 | 0 |
| 4: | 0:00 | 0 | 4: | 0:00 | 0 |
| 5: | 0:00 | 0 | 5: | 0:00 | 0 |

Hours per Day

Diary Code Drives the Bank Holidays for All Skill Levels
Bank Holiday Code: **A All days chargeable**
Skill Level: **1** * Any Blank Weekdays will assume Monday Settings!

| Monday | Hours | Rate | Tuesday | Hours | Rate |
|----------|-------|------|----------|-------|------|
| Normal | 8:30 | 1 | Normal | 0:00 | 0 |
| Overtime | 4:00 | 2 | Overtime | 0:00 | 0 |
| Double | 1:00 | 3 | Double | 0:00 | 0 |

| Wednesday | Hours | Rate | Thursday | Hours | Rate |
|-----------|-------|------|----------|-------|------|
| Normal | 0:00 | 0 | Normal | 0:00 | 0 |
| Overtime | 0:00 | 0 | Overtime | 0:00 | 0 |
| Double | 0:00 | 0 | Double | 0:00 | 0 |

This setup enables different labour rates to be used with different engineers. The skill levels created can divide the working day into sections of time or hours, and charge a different labour rate for each.

Separate times per day or hours per day may be set up for each individual day of the week with an additional section for bank holidays. It is essential to enter details for Monday as any days left blank will be charged on the same basis as for Monday.

The Time Clock should be set for each employee skill level used. Up to 5 skill levels may be used to categorize staff for charge out. Each engineer is allocated a skill code on the Employee Rates File.

- **Employee Rates**

This file is for the individual engineers and shows the hourly rate, for costing purposes, for each labour rate used. The skill level, scanner id, payroll number and lunch break are also set up for each employee.

Select the required employee.

The hourly employee cost for each labour rate may already be setup but can be reviewed here.

| Rate | Description | Engineer Cost |
|------|---------------------|---------------|
| 1 | NORMAL TIME | 6.50 |
| 2 | OVERTIME | 9.75 |
| 3 | APPRENTICE NORMAL | |
| 4 | APPRENTICE OVERTIME | |
| 5 | CONTRACTORS | 7.50 |
| 6 | | |
| 7 | | |
| 8 | | |
| 9 | | |
| 10 | | |
| 11 | | |
| 12 | Adjustments | |

Engineer: 1

Default Rate: 1


Sales Uplift %age: 100.00

Cost Uplift %age: 100.00

The Skill Level for the engineer should be checked and altered if necessary. This is the link to the Time Clock Control that dictates the labour rate to be charged.

Enter the full 6-digit unique scanner identifier code into the Unit ID field, this is the device identification number entered above. This assigns a particular bar code scanner to an employee or engineer.

If the link is required to transfer the engineer hours worked to the payroll module then the employee number from the payroll module should be entered.


 **Note - Only employees who are set to Weekly Hourly pay may be linked in this way.**

If required a Lunch Break start and end time may be entered. If the hours worked on a job go over this time it is not charged to the job. Accept/save the employee record when all required changes have been made.

The employee may now start to use the scanner.

- **Workshop Job Cards**

Workshop job instruction cards printed from the workshop module can have bar codes printed on them.

 **Note - To enable a laser printer to print bar codes, contact Ibcos Support who will set up the printer via the modem.**


Bar codes for the start and end job times will be printed on the job instructions. Two other categories of bar code start and end times may also be printed if required, for example, these could be used for travel time or idle time.

Notes:

Using the Scanner


To scan bar codes aim the scanner at the bar code. Press and hold the scan button until a tone is heard.

**IMPORTANT NOTE –
DO NOT UNDER ANY CIRCUMSTANCES USE THE BAR CODE SCANNER TO SCAN ANYTHING
OTHER THAN A GOLD WORKSHOP BAR CODE**

 **Note - Ensure that the scanner beam covers the entire bar code and extends approximately 1cm either side. The scanner should be held approximately 2.5" from the bar code and at a slight angle.**

To delete bar codes aim the scanner at the barcode to be deleted from memory. Press and hold the scan button until a tone is heard.



 **Note - The scanner does not need to be plugged into the cable whilst scanning bar codes.**

Battery Maintenance

The Opticon scanner batteries need to be recharged by resting in the scanner cradle

Reading Data from the Scanner

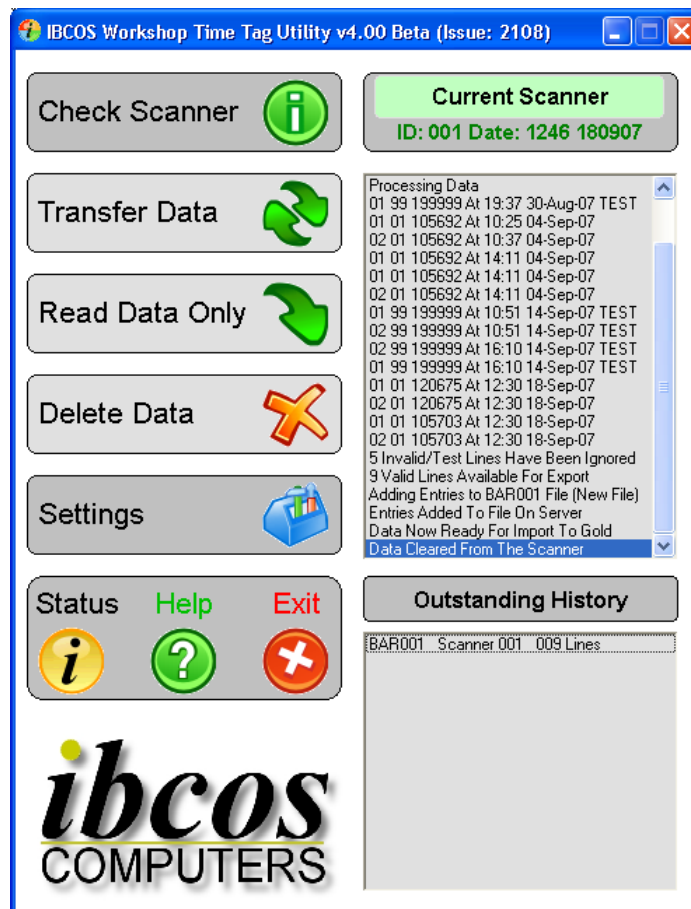
The engineer hours scanned should be downloaded regularly from the bar code scanner(s).


- Attach the scanner to the communication cable or rest in the cradle. Ensure the other end of the cable remains attached to the USB communication port on the back of the computer.
- Start the interface software by double clicking on the icon on the desktop of the PC.



- Click on the “Transfer Data” button. All information stored on the scanner will be displayed.

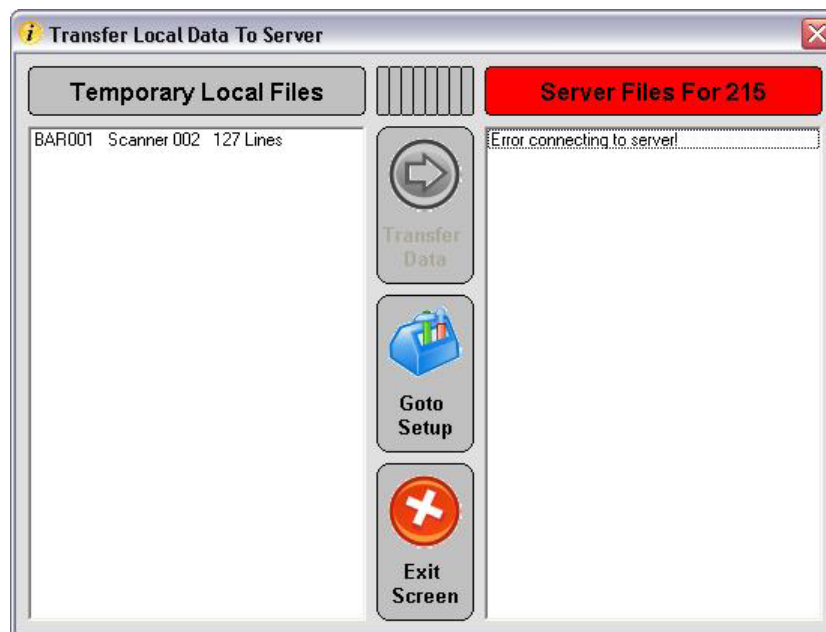
When communication between the scanner and software commences the indicator light on the scanner blinks and the scanner beeps.



- A file will be created so that the information may be imported into Gold to update the relevant workshop jobs and the scanner will be cleared of data other than jobs started on the current day but not yet ended.
 - If the server update is set to “batch” the scanner files are listed in the Outstanding History section. To transfer all files to the server click on the outstanding history. There is also an option to perform the transfer when exiting the software.
-  **Note - a new file will be created for each employee. If an employee has an existing file that has not been imported into Gold in full, the new entries will be appended to the existing file.**
- When all scanners have been downloaded the software may be closed with the “Exit” button. This gives an option to either exit completely or run the software in the task tray. Any outstanding batches can be transferred at this time.

Transfer Batch Files

The following screen is displayed when transferring files in batch. Select files from the Temporary Local Files section and use the “Transfer Data” icon to move them across to the Server.



Importing Data into Gold

To import the file created into the Gold software firstly log into Gold as normal and ensure that the login has taken you to the correct company.



Note – Do NOT download any further scanners until this process has been completed for the current scanner file.

- Navigate to the Workshop Control module and from the Batch Entry/Time sub menu select Automated Time Sheet Entry.
- Ensure that all required scanner recordings have been transferred to the pc and select 'Yes' to continue.
- The system will then check and process any scanner files ready to be imported. This may take a few minutes depending how many scanner files need to be imported, the file import progress will be displayed at the bottom of the screen.
After processing, a report will be printed of the scanner information downloaded.
- "Continue with Data Validation" – Select 'Yes' to continue.
Entries for the first employee will be displayed in a list on screen. Any lines with incomplete or invalid data will be marked with an asterisk (*). These may be amended using the Amend (F3) function or Deleted as required.

The screenshot shows two overlapping windows. The top window, titled 'Automated Time Clock Entry', displays the following information:

| | | | | |
|-----------|---|------------|--------------|------------|
| Employee: | 1 | John Skill | Date: | 12/06/2005 |
| Unit ID: | 1 | | Hours: | 14:04 |
| | | | Prev. Hours: | 0:00 |
| | | | Total: | 14:04 |


The bottom window, titled 'Automated Timeclock Entry', displays a table of time entries:

| | Job No. | Description | Account | Customer | Date | Start | End | Hours |
|---|---------|----------------------|---------|----------|------------|-------|-------|-------|
| * | 105365 | Workshop Sales(Hist) | 1200 | BARLOW2 | 12/06/2005 | 0:00 | 11:52 | 11:52 |
| | 105380 | Workshop Sales(Hist) | 1200 | BARLOW2 | 12/06/2005 | 11:52 | 12:23 | 0:29 |
| | 105382 | HortWSJ Chargeable | 1200 | BARLOW2 | 12/06/2005 | 12:55 | 14:55 | 2:00 |

At the bottom of the second window, there are two buttons: 'Amend' and 'Delete'.



Note - Incomplete entries for the CURRENT day, i.e. jobs started but not ended, will NOT be downloaded but retained on file for the next download.

- **“Continue with Timeclock Update”** – Select ‘Yes’ to continue.
Entries for the next employee will be displayed or, if no further time clock files exist, a message “Update Time to Workshop Jobs” is displayed. Select ‘Yes’ to continue and make the postings to the workshop jobs.
 - A further report detailing the entries actually made will be printed.
-  **Note – The labour rate charged to the job(s) is calculated from System Management, Wholegoods/Workshop, Time Clock Control program which is set up with the time or hours per day for the labour rates used.**

Reporting

The Key Fob Time Sheet Print produces a detailed or summary report of hours recorded within a specified date range.